

State of California
Department of Industrial Relations
Self Insurance Plans
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INSTRUCTIONS: PRIVATE and GROUP SELF INSURER'S ANNUAL REPORT Year Ending December 31, 2008

Please note: By accessing the SIP website and downloading the form, you are not submitting any data electronically.

General Information

All private individual and private group self insurers, both active and revoked, are required to report their self insured workers' compensation claims experience for the preceding year on the Self Insurer's Annual Report form issued by the Office of Self Insurance Plans (SIP). The report for 2008 must be completed and filed with SIP no later than **March 1, 2009**.

The annual report form is a fillable pdf document and consists of two separate forms. One is identified as "I. GENERAL – To be Completed by the Employer." and the other is identified as "II. LIABILITIES BY REPORTING LOCATION." The computer to which the form is downloaded must have a version of Adobe Reader that is 5.0 or later in order to view and print the form. The reader can be downloaded for free at: <http://www.adobe.com>. SIP has provided user ID numbers and passwords to all users (self insured employers and/or administrators) that are required to complete reports. Those users can then log onto the SIP website at <http://sip.dir.ca.gov/> and download the form(s) with a portion of the form pre-populated with data to identify the user correctly.

Two completed reports must be submitted to SIP. At least one report must include the original "wet" signature of the self insurer on page 4 and an original signature of the claims administrator on each page 2, "Liabilities by Reporting Location". Note that a separate "Liabilities by Reporting Location" must be submitted for each location that administers claims. Note that group self insurers must also report separate "Liabilities by Reporting Location" pages for each location, **but not separate pages for each group member**. All group member claims handled at one adjusting location should be included on the locations report for that location. *However*, please identify the employer for each open indemnity claim on the "List of Open Indemnity Claims". In addition, submit one set of the List of Open Indemnity Cases with the Annual Report.

The reports must be filed with Self Insurance Plans no later than **March 1, 2009**. We accept the reports beginning January 2 of each year.

Please include two copies of the self insured employer's current financial statement with the annual report, or as soon as it becomes available.

When data is entered, any box highlighted in yellow is an automatic calculation. Once "Incurred Liability Indemnity" figures and "Paid to Date Indemnity" figures are entered, estimated future liabilities will be automatically calculated and will appear in the "Future Liability Indemnity" box. If there is an error, the box

will be highlighted in **red** (for instance, if the difference between the incurred and paid indemnity for all cases and all open cases in a given year is not the same). If the same type of error for Incurred and paid medical is made, the box will be highlighted in **blue**.

If there are no errors, the estimated future liabilities boxes will not be highlighted and you can continue entering the remaining data. If you are unable to determine the reason for the error, click on the “Help” button. **The Form will not print if the errors are not corrected.**

To print the report, use the **green** print button on the first page of the report. Once all adjusting location pages from the claims administrator(s) have been received, the employer must enter employer data as required, then print the form. When the form is printed, a barcode will appear on the first page. **SIP staff will be able to scan the data into the SIP database when the signed, hard copies are received from the employer.** Attach all claims administrator adjusting location pages and submit the entire report to Self Insurance Plans. To print the report, click on the **green** button on the first page.

Keep in mind that if any **errors are not corrected, the report will not print.** Indemnity errors will be highlighted in “**red**” and medical errors will be highlighted in “**blue**”. Once the report is printed, a barcode will appear on the first page. **Please sign and attach all the pages and return to the self insured employer.** The employer will sign and submit the entire report, including all Adjusting Location reports to Self Insurance Plans (The employer’s portion will also have a barcode on the first page).

PRINTING PROBLEMS

If after making sure that you have entered employee and payroll information, you are still unable to print, there are a number of possible solutions:

- Make sure you have clicked on the green print button to print the document. If you have used the pull down menu under “File” or “Command p” from the keyboard, the document will not print.
- If the entire page(s) will not print, make sure that page size is scaled to fit your paper. After clicking on the green print button, select the option to “fit to paper size” or “shrink oversize paper to paper size.”

If a problem exists where data you have entered on the form disappears or appears upside down on the form, click on the red button to “re-set the form”, download the form again from the SIP website, then re-enter the data.

If you are still unable to print the form, it may be that your computer utilizes the 7.x Adobe Acrobat version. Make sure you use an Adobe version that is 5.0 or greater

If you have any questions or need additional assistance, please feel free to contact Tina Freese at (916) 574-0737 or you can send an email to Tfreese@dir.ca.gov